

# **MINUTES**

## **For**

### **RDU PMii User Group Meeting #9**

**April 16, 2007 2:00 p.m.**

- **Activity Confirmation Spreadsheet**

Jimmy Norris is in the process of compiling all the data received from other units. There are a couple of units from which he has not received information.

The user group decided that we should distribute the Roadway Design Activity Confirmation spreadsheet to the rest of the unit for them to start using. Ron Allen will coordinate with Jim McMellon concerning creating a special section on our website to house the Confirmation spreadsheet, the User Group minutes, and the FAQs.

During the discussion of the activity confirmation spreadsheet, the group discussed milestone usage. A review of the list of standard milestones is one of the next tasks the group needs to undertake. This review should address who “owns” the milestone and when should an actual date be entered...similar to what we did with the activities and elements.

During the milestone discussion, the issue of “fixed dates” resurfaced. The group bounced back and forth between either (1) adding fixed dates to all milestones or (2) adding them to milestones that are not at the beginning or end of an activity, or if they are, add them to milestones attached to activities that you don’t own. We decided that there was not an easy solution and that the group would have to analyze each milestone to determine the appropriateness of using fixed dates.

The purpose of fixed dates is to keep a record of when the milestone was “supposed” to occur. Consultant Coordination utilizes this concept quite frequently, as it is a way to track the success of how well a PEF meets their deadlines. At the time a milestone is to have an “actual date” applied, the scheduled date of the milestone is copied into the “fixed date” field. Whenever the project is re-scheduled, you would not lose the original scheduled date. This may be appropriate for the in-house design groups on milestones such as THYD, FHYD, TLOC, FLOC, etc.

- **New Projects / New Networks**

The main discussion point here was how are folks being notified when a new project has been created and / or new networks are added? The RDU PMii User Group would like to recommend a formal process to Program Development.

Ron Allen distributed to the group draft guidelines on when Post Year networks would be utilized. This document was introduced at the Main PMii User Group and still under review. It is located on the portal at <https://intranet.dot.state.nc.us/Portal/Handlers/GroupDocuments.ashx?itemId=4024&tabid=239> Consensus at the Main PMii User Group meeting was that for changes on existing projects, such as the use of a Post Year Network, Program Development would use ZPSR26 to create an e-mail distribution list to notify Co-Project Managers and Activity Managers of a potential change. The e-mail should further direct the Activity Managers to notify the Co-Project Managers of any concerns.

On new project projects that have not been created in PMii, the RDU PMii User Group recommends the following process:

- (1) Prior to creation of a new TIP project network, Program Development will e-mail PDEA (Missy Dickens) and Roadway Design (Ron Allen and Dewayne Sykes) to inform both groups that a new project is to be created in SAP R/3 (PMii) and request the names of the respective Co-Project Managers.
- (2) Upon assignment of Co-Project Managers, Program Development will coordinate with the Co-Project Managers to determine the appropriate network to create for the project based on the latest available information.
- (3) Upon creation of the new project network, Program Development will e-mail all unit heads that own activities and elements (cc Co-PMs) with the following suggested message:

“TIP Project X-1234 has recently been created in SAP R/3 (PMii or new name). Please forward this e-mail to the appropriate staff member in your unit in order that lower level work center assignments can be made. In addition, if your unit is responsible for activities, please review the standard durations and control key to determine if adjustments need to be made at this time. Below you will find some basic information concerning the project. Please complete this request by 2 weeks from date of e-mail and e-mail the Co-Project Managers and the Program Development contact so that the project can be scheduled.

TIP No:

Division:

County:

Project Length:

Description:

Initial Scope of Work:

PDEA Co-PM:

RDU Co-PM:

- **Schedule Changes and Use of PS Text**

Gary Lovering gave the group a demo of an issue with the PS Text for schedule changes. It seems that the template to be used for schedule changes is intermingled with a large list of previously stored schedule changes that have occurred on many different projects. Co-PM's will sometimes use schedule change forms from other projects and edit to fit their project. After editing the form, the Co-PM could erroneously tag the “transfer” button saving the schedule change in the Co-PM's project, but also changing the previously stored PS Text in the other Co-PM's project.

Follow-up: Jimmy Norris talked with Stan MacIntyre about a CR that will (1) remove all the previously stored schedule change forms except for the template, or at least have the template always show up at the top of the list, and (2) have the Transfer button eliminated or “grayed out”.

Ron Allen also indicated that he would follow up on a special request to Program Development regarding schedule change PS Text. Below is a portion of his request:

*We discussed the use of PS Text in our latest RDU PMii User Group meeting and I told the group I had made this suggestion but wasn't sure if your group would implement it or not. The main issue is that when a Co-PM proposes a schedule change, they must decide where to place the PS Text. Typically this would occur at the activity causing the schedule change, but in some cases it could be just a fiscal change and the PS Text could be placed at Obtain RW Authorization or at Review Bids for Contract Letting. The point is the PS Text for schedule changes could be scattered throughout and not necessarily chronological. Therefore, I thought it would be a good idea in Program Development's PS Text listing the schedule change history to include the Network name and Activity name & number where the Co-PM's PS Text is located.*

- **Continue Review of FAQ List**

Time expired before we had a chance to cover this topic thoroughly. Ron Allen suggested to the group that special attention was needed for this item and we may need to review the document question by question. A special meeting to cover this item may be necessary.